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**Jim Doyle, Governor**  
**Cory L. Nettles, Secretary**

## **MEMORANDUM**

**DATE:** February 3, 2004

**TO:** **ALL PROSPECTIVE APPLICANTS FOR THE STATE'S  
COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM (CDBG)**

**FROM:** JIM FRYMARK  
BUREAU DIRECTOR

**SUBJECT:** INCOME SURVEY

Before using the Income Survey guide to determine eligibility of your project area for CDBG funding, please consult the Department for further guidance. The U.S. Census 2000 Low and Moderate Income data was recently released. Commerce has this data for all local units of government eligible for the State's CDBG program and will use this data for determining area-wide eligibility for funding under the CDBG Program's National Objective of "benefit to low and moderate-income persons."

Because the data is relatively current, there is no need for a special community-wide survey. However, if you feel the data is misrepresentative of your community, please call me to discuss your concerns. Special or unusual circumstances will be taken into consideration in determining whether a survey is necessary.

Target area surveys will continue to be required even if the community is 51% or more low and moderate-income.

As you read through the survey guide, you will note the need to gather data by racial and ethnic classifications. Federal program regulations require the gathering of this data for CDBG assisted projects.

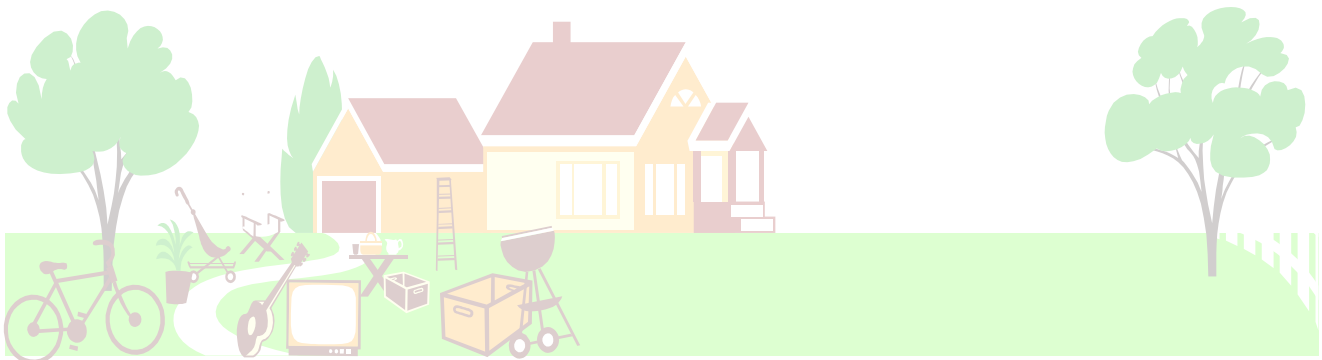
Communities undertaking a survey for the Department's CDBG programs without first consulting with the Department risk having it not accepted. Commerce will review annually its practice to limit community-wide eligibility and determine the use of the published census data.

Should you have any questions, please contact us at (608) 266-8934.

# Community Development Block Grant Program (CDBG)

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## INCOME SURVEY GUIDE FOR NON-HOUSING CDBG PROGRAMS



Please Return To:

WI Department of Commerce  
Division of Community Development  
Bureau of Community Finance  
201 W. Washington Ave.  
P.O. Box 7970  
Madison, WI 53707

Attn: Program Assistant

# SURVEY

A valid survey for Commerce must contain the following survey questions as it is presented below. **If you plan on using the survey results for other grant or loan programs (i.e. CDBG Housing), please contact the administrating agency to ensure the final design of your survey instrument also meets their program requirements. You must fill out the “Household Street Address” or provide another means to indicate each household location.** If you are having difficulty completing your survey, you may want to call the households who did not respond to collect the needed information.

## CDBG PUBLIC FACILITIES INCOME SURVEY

### Sample Paragraph

The (City, Town, County, Village, County) of \_\_\_\_\_ is conducting a survey of its citizens to obtain income information which will help us decide whether to apply for a Community Development Block Grant from the Wisconsin Department of Commerce to make public infrastructure improvements. If we do not receive adequate survey responses, we will not be eligible to apply for this assistance. Your participation in this survey is voluntary.

\_\_\_\_\_  
Chief Elected Official

### SURVEY INCOME QUESTION

Find your household size in the left-hand column. Indicate, **on the same line as your household size**, your **total gross household income** as being either BELOW or ABOVE the income level listed for your household size.

***See Appendix A for Household Income Levels***

HOUSEHOLD SIZE	HOUSEHOLD INCOME LEVEL	BELOW	ABOVE
1	\$		
2	\$		
3	\$		
4	\$		
5	\$		
6	\$		
7	\$		
8	\$		

\_\_\_\_\_  
Household Street Address

Find your county and fill in the income for each household size. Here is an **example** of how to fill in the second column of the **Survey Income Question** for **Adams Co.:** 80% CMI=Moderate Income (MI)

	HOUSEHOLD INCOME LEVEL	BELOW	ABOVE
1	<b>\$29,600</b>		

## SURVEY RACIAL AND ETHNIC QUESTION

As of January 1, 2003, the U. S. Department of Housing and Urban Development (HUD) has adopted new standards for collecting and reporting racial and ethnic information. The table below must be included as part of the Income Survey. Self-reporting, rather than observer identification, is the preferred method of collecting race and ethnicity data. Self-identification for race and ethnicity means that responses are based on self-perception.

***See Appendix B for Racial and Ethnic Definitions***

<b>Race/Ethnicity</b>	<b>Total</b>	<b>Hispanic The quantity listed should be included in the Total in the left column. ( i.e. of the number of White, how many are Hispanic White?)</b>
White		
Black or African American		
Asian		
American Indian or Alaskan Native		
Native Hawaiian or Other		
American Indian or Alaskan Native & White		
Asian & White		
Black or African American & White		
American Indian or Alaskan Native & Black or African American		
Other Multi-Racial		
Asian or Pacific Islander		
Hispanic		
<b>Total (The total number of people benefiting from the activity)</b>		

## **SURVEY RESPONSE RATE TABLE**

**You must meet the response rate in the table below for any given survey size before Commerce will accept the survey results.**

Total Number of Households in Target Area (Number)	Minimum Response Rate (%)
Less than 100	80
100 - 159	75
160 - 239	65
240 - 299	60
300 - 499	55
500 - 799	50
800 - 999	45
1,000 or more	40

The response rate is calculated as follows:

$$\frac{\text{Total Number of Completed Interviews}}{\text{Total Number of Households in Target Area}}$$

## **MAP**

Include a map of your community's jurisdictional boundaries, including boundaries of the target area where the income survey was conducted.

## SURVEY CHART

Tabulate the survey results on a blank survey instrument. Include the total number of responses of all LMI and non-LMI persons. The surveys will be reviewed during the monitoring of the project. Commerce may also randomly select applicants to submit their surveys for review.

1. When was the survey data collected? \_\_\_\_\_
2. The survey was:     ☐ All of target area             ☐ Random sample of target area
3. How many housing units (including vacant units) are:
  - a. If appropriate, in the target area? \_\_\_\_\_ occupied \_\_\_\_\_ vacant
  - c. If appropriate, in the random sample? \_
4. How many completed responses were obtained? \_\_\_\_\_
5. How many completed LMI responses were obtained? \_\_\_\_\_
6. Are the completed survey questionnaires on file with the applicant? \_\_\_\_\_
7. Can respondents be identified by a limited geographic area (e.g., address, block, census tract, target area, or pre-identified and limited area)?

If there has been significant changes to the local economy since the 1990 Census, please explain below:

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# APPENDIX A

## 2003 Section 8 County Median Income (CMI) Limits

SIZE OF HOUSEHOLD									
COUNTY	CMI %	1 person	2 people	3 people	4 people	5 people	6 people	7 people	8 people
Adams	80%	29600	33850	38100	42300	45700	49100	52500	55850
Ashland	80%	29600	33850	38100	42300	45700	49100	52500	55850
Barron	80%	29600	33850	38100	42300	45700	49100	52500	55850
Bayfield	80%	29600	33850	38100	42300	45700	49100	52500	55850
Brown	80%	34650	39600	44550	49500	53500	57450	61400	65350
Buffalo	80%	30600	34950	39300	43700	47150	50650	54150	57650
Burnett	80%	29600	33850	38100	42300	45700	49100	52500	55850
Calumet	80%	34650	39600	44550	49500	53500	57450	61400	65350
Chippewa	80%	28850	32950	37100	41200	44500	47800	51100	54400
Clark	80%	29600	33850	38100	42300	45700	49100	52500	55850
Columbia	80%	32800	37500	42200	46900	50650	54400	58150	61900
Crawford	80%	29600	33850	38100	42300	45700	49100	52500	55850
Dane	80%	38100	43500	48950	54400	58750	63100	67450	71800
Dodge	80%	32650	37300	42000	46650	50350	54100	57850	61550
Door	80%	29800	34050	38300	42550	45950	49350	52750	56200
Douglas*	80%	28450	32500	36600	40650	43900	47150	50400	53650
Dunn	80%	29800	34050	38300	42550	45950	49350	52750	56200
Eau Claire*	80%	28850	32950	37100	41200	44500	47800	51100	54400
Florence	80%	29600	33850	38100	42300	45700	49100	52500	55850
Fond du Lac	80%	32600	37250	41900	46550	50300	54000	57750	61450
Forest	80%	29600	33850	38100	42300	45700	49100	52500	55850
Grant	80%	29600	33850	38100	42300	45700	49100	52500	55850
Green	80%	31450	35950	40450	44950	48550	52150	55750	59350

# SIZE OF HOUSEHOLD

COUNTY	CMI %	1 person	2 people	3 people	4 people	5 people	6 people	7 people	8 people
Green Lake	80%	29800	34050	38300	42550	45950	49350	52750	56200
Iowa	80%	37250	42550	47900	53200	57450	61700	65950	70200
Iron	80%	29600	33850	38100	42300	45700	49100	52500	55850
Jackson	80%	29600	33850	38100	42300	45700	49100	52500	55850
Jefferson	80%	33450	38200	43000	47750	51600	55400	59200	63050
Juneau	80%	29600	33850	38100	42300	45700	49100	52500	55850
Kenosha	80%	33450	38200	43000	47750	51600	55400	59200	63050
Kewaunee	80%	32600	37250	41900	46550	50300	54000	57750	61450
La Crosse	80%	30250	34550	38900	43200	46650	50100	53550	57000
Lafayette	80%	29600	33850	38100	42300	45700	49100	52500	55850
Langlade	80%	29600	33850	38100	42300	45700	49100	52500	55850
Lincoln	80%	30000	34300	38600	42900	46300	49750	53150	56600
Manitowoc	80%	33650	38450	43250	48100	51950	55750	59600	63450
Marathon	80%	32300	36950	41550	46150	49850	53550	57250	60950
Marinette	80%	29600	33850	38100	42300	45700	49100	52500	55850
Marquette	80%	29600	33850	38100	42300	45700	49100	52500	55850
Menominee	80%	29600	33850	38100	42300	45700	49100	52500	55850
Monroe	80%	29600	33850	38100	42300	45700	49100	52500	55850
Oconto	80%	29750	34000	38250	42500	45900	49300	52700	56050
Oneida	80%	29600	33850	38100	42300	45700	49100	52500	55850
Outagamie	80%	34650	39600	44550	49500	53500	57450	61400	65350
Ozaukee	80%	37650	43000	48400	53750	58050	62350	66650	70950
Pepin	80%	29600	33850	38100	42300	45700	49100	52500	55850
Pierce	80%	38100	43500	48950	54400	58750	63100	67450	71800
Polk	80%	30650	35000	34900	43750	47250	50750	54250	57750



SIZE OF HOUSEHOLD									
COUNTY	CMI %	1 person	2 people	3 people	4 people	5 people	6 people	7 people	8 people
Portage	80%	34600	39550	44500	49450	53400	57350	61300	65250
Price	80%	29600	33850	38100	42300	45700	49100	52500	55850
Racine	80%	36400	41600	46800	52000	56150	60300	64500	68650
Richland	80%	29600	33850	38100	42300	45700	49100	52500	55850
Rock	80%	33450	38200	43000	47750	51600	55400	59200	63050
Rusk	80%	29600	33850	38100	42300	45700	49100	52500	55850
St.Croix	80%	38100	43500	48950	54400	58750	63100	67450	71800
Sauk	80%	30450	34800	39150	43500	47000	50500	53950	57450
Sawyer	80%	29600	33850	38100	42300	45700	49100	52500	55850
Shawano	80%	29600	33850	38100	42300	45700	49100	52500	54900
Sheboygan	80%	35100	40150	45150	50150	54150	58200	62200	66200
Taylor	80%	29600	33850	38100	42300	45700	49100	52500	54900
Trempealeau	80%	29600	33850	38100	42300	45700	49100	52500	54900
Vernon	80%	29600	33850	38100	42300	45700	49100	52500	54900
Vilas	80%	29600	33850	38100	42300	45700	49100	52500	54900
Walworth	80%	34850	39800	44800	49750	53750	57700	61700	65700
Washburn	80%	29600	33850	38100	42300	45700	49100	52500	55850
Washington	80%	37650	43000	48400	53750	58050	62350	66650	70950
Waukesha	80%	37650	43000	48400	53750	58050	62350	66650	70950
Waupaca	80%	30750	35150	39550	43900	47450	50950	54450	57950
Waushara	80%	29600	33850	38100	42300	45700	49100	52500	55850
Winnebago	80%	34650	39600	44550	49500	53500	57450	61400	65350
Wood	80%	33900	38700	43550	48400	52250	56150	60000	63900

80% CMI = Moderate Income (MI)

## ***APPENDIX B***

### **Racial and Ethnic Definitions**

**American Indian or Alaska Native.** A person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.

**Asian.** A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

**Black or African American.** A person having origins in any of the black racial groups of Africa. Terms such as “Haitian” or “Negro” can be used in addition to “Black or African American.”

**Native Hawaiian or Other Pacific Islander.** A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

**White.** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

**Hispanic or Latino.** A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. The term “Spanish origin,” can be used in addition to “Hispanic or Latino”.

**Not Hispanic or Latino.** A person not of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.